



2018 Spring & Summer Advertising Effectiveness & ROI

November 2018

Background

- The New Hampshire Division of Travel and Tourism Development (DTTD) continues to place seasonal media campaigns targeting leisure travelers. Based on results of previous campaigns, media, markets and creative are continually revised.
- In order to be accountable for the resources invested in these efforts, DTTD has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing for the past three fiscal years. An entire year's worth of media was evaluated in a single measure for the past two years. But for 2017-18 there are two waves of research based on seasonal placements. This is an evaluation of the spring and summer media buys. With a previous measure of the fall and winter 2017-18 media, there is a complete picture of the entire fiscal year's marketing.
- The specific objectives of this seasonal awareness research:
 - Measure the reach of the spring and summer advertising among a targeted audience;
 - Evaluate the effectiveness of the Division's marketing through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
 - Understand the overlap and potential impact of multiple media;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
 - Assess the ability of the advertising to motivate interest in visiting and increase visitation;
 - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
 - Forward insights into future refinement of the marketing.

Methodology

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so an online survey was developed and programmed. National sample vendors provided a survey link to potential respondents.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- In order to evaluate individual target markets, quotas were established in Montreal, Boston, and New York City. The Division's paid media placements have the ability to reach a broader audience throughout the Northeast. So in addition to the spot markets evaluated, interviews were also completed in other markets in Connecticut, Maine, Massachusetts, Rhode Island, Vermont, New Jersey, and New York.
- A total of 2,335 interviews were conducted across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. For readability, numbers throughout the report have been rounded. Thus straight calculations do not reflect the totals. The questionnaire, including ads tested appear in the Appendix to this report.

	Completed Interviews
Montreal	618
Boston	405
New York	808
Other Northeastern States	504
Total	2,335

Campaign Overview

- Spending for the Spring & Summer 2018 campaign was targeted in Boston, New York and other markets in the Northeast United States as well as Montreal.
- Overall, there was a slight increase in spending for the Spring/Summer campaign from the previous year. However, this seasonal investment is nearly half what it was just two years ago.
- The media measured in this research includes broadcast TV, out-of-home and digital. Digital investment included banners, video and paid social.
- However, there was also small investment in radio/podcasts and print which is not measured here and the associated spending is not included.

















	TV	Out-of-Home	Digital	Total
Montreal	\$ 69,232	\$ 50,420	\$ 46,590	\$ 166,242
Boston	\$ 28,333	\$338,320	\$ 55,714	\$ 422,368
New York	\$294,535	\$319,150	\$ 51,778	\$ 665,463
Other Northeast	\$169,245	\$54,150	\$316,630	\$ 540,024
Total	\$561,345	\$762,040	\$470,711	\$1,794,097

	Fall/ Winter	Spring/ Summer	Total
2015-16	\$597,447	\$3,144,803	\$3,742,250
2016-17	\$718,592	\$1,563,742	\$2,282,334
2017-18	\$687,891	\$1,794,097	\$2,481,988
% Change	-4%	15%	9%



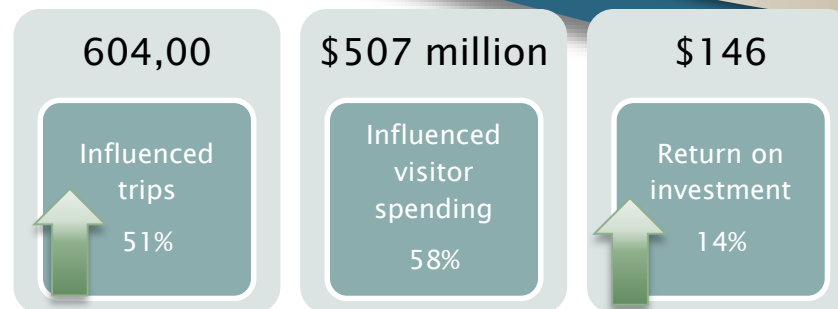
Insights

- With a sustained presence in target markets, the New Hampshire Spring/Summer paid media campaign was able to reach more consumers. Consumers are also responding better to the creative, pushing influence higher.
- Combined with the Fall/Winter evaluation, the 2017-18 fiscal year media generated more than \$500 million in influenced visitor spending. This results in a fiscal year return on investment (ROI) of \$204, higher than the previous year and the average for state destination marketing organizations across the country.

Measure	New Hampshire 2016-17 Campaign	New Hampshire 2017-18 Campaign	SMARInsights Benchmarks for State DMO Campaigns
Communication Ratings	3.8 	4.0 	3.9
Impact Rating: These ads make me want to visit New Hampshire	3.8 	3.8 	3.7
Impact Rating: These ads make me want to learn more about things to see and do in New Hampshire	3.7 	3.7 	3.7
Impact Rating: These ads make me want to go to the state website or request a brochure from New Hampshire	3.5 	3.5 	3.5
Spring/Summer Awareness	38% 	43% 	Predicted awareness:44%
Spring/Summer Cost per aware household	\$0.29 	\$0.29 	\$0.67
Fiscal Year ROI	\$146 	\$204 	\$179
Fiscal Year Tax ROI	\$8.50 	\$12.83 	\$11

Insights

- The influence of the Division's fiscal year investment rebounded with sustained investment and creative with stronger appeal. The Division's refinements over the past two years, especially in the Boston market, have generated improvements in efficiency and performance.
- However, there remain opportunities for continued improvement, namely in markets and media. Results for New York City have fallen over the past three years. Of the overall visitors to New Hampshire, 65% have incomes between \$50,000 and \$150,000. However, qualitative focus groups in the market in 2018 showed that the target audience for this market likely has incomes higher than the average. Given the cost of living in the market, it is difficult to convince lower income households to pass over closer destinations that offer similar product in favor of a bigger, more expensive trip to New Hampshire.
- This, combined with minimal incremental travel from the market, points to moving toward a more targeted strategy for the market. While higher income audiences are able to be targeted for digital executions, this is more difficult for brand executions. But given New York City is a less familiar market, audiences here likely need both brand and tactical messaging.
- Similarly, other markets in the Northeast would likely be well served by more brand messaging. The combination of brand and tactical components of a destination campaign are especially effective when markets are less familiar.
- As a familiar market, Boston needs less brand messaging and pulling back the TV investment in this market was key to increased efficiency and contributed to the market generating the highest ROI.

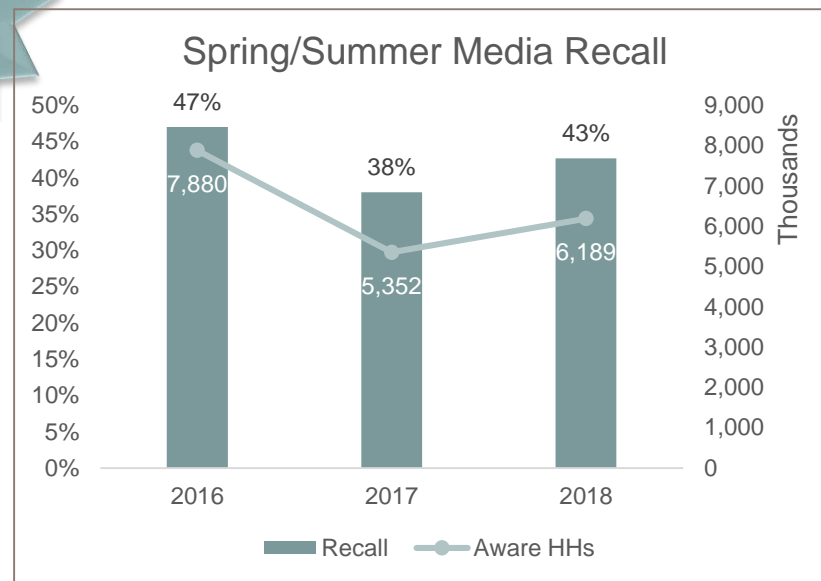


MARKETING AWARENESS

Overall Awareness

- The spring and summer paid media reached more than 6 million households in the Northeastern U.S. With both sustained creative and an increase in resources, the campaign was able to boost recall.
- Through the measurement of hundreds of destination marketing campaigns, SMARInsights has established a number of benchmarks for paid media campaigns. The key measure for evaluating the efficiency of a marketing campaign is the cost per aware household. The average cost for campaigns attempting to reach spot markets as the New Hampshire campaign does is \$0.67.
- With a cost per aware household of just \$0.29, the spring/summer campaign is more efficient than average.

SMARInsights' spot market benchmark: \$0.67 per aware household



Spring/Summer Recall	2016	2017	2018
Recall	47%	38%	43%
Aware HHs	7,880,145	5,352,332	6,189,099
Media Spending	\$3,144,803	\$1,563,742	\$1,794,097
Cost per Aware HH	\$0.40	\$0.29	\$0.29

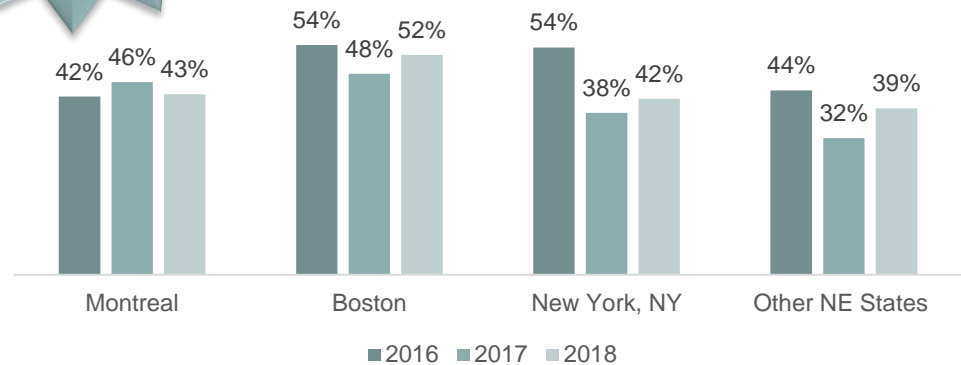
*Totals may not add due to rounding

Overall Awareness

- Recall in New Hampshire's largest markets – both in terms of resources allocated and number of targeted households - improved. There was, however, a decline in recall from Montreal.
- Each of the target markets is performing better than average DMO paid media campaigns. Though recall was higher in domestic markets in 2016, spending was significantly higher, resulting in markets that were generating higher than average costs per aware household.
- So while recall has fallen from two years ago, the campaign is more efficient than when significantly more was being spent on paid media.

SMARInsights' spot market benchmark: \$0.67 per aware household

Spring/Summer Recall

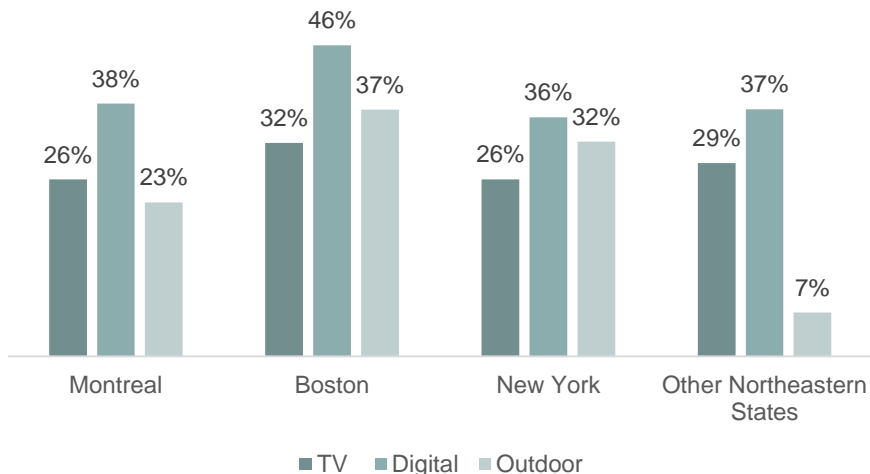


	Montreal	Boston	New York	Other NE States
Targeted Households	1,659,368	2,142,302	6,578,364	4,116,239
Recall	43%	52%	42%	39%
Aware HHs	708,856	1,116,113	2,741,671	1,622,459
Media Spending	\$166,242	\$422,368	\$665,463	\$540,024
Cost per Aware HH	\$0.23	\$0.38	\$0.24	\$0.33

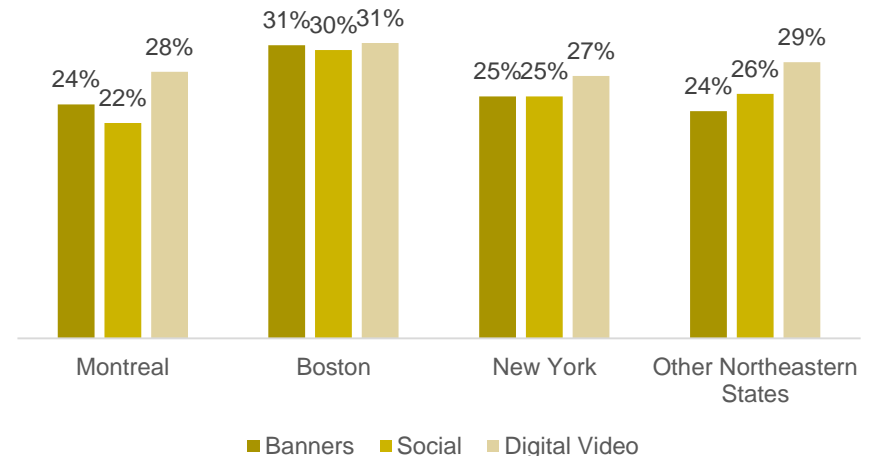
Recall by Media

- Overall recall is being driven by digital, which has the highest recall in all the target markets.
- With three executions of digital – banners, paid social and video – there are multiple options for exposure to digital content. Across all markets digital video has the highest recall of the digital components.

Recall by Media & Market

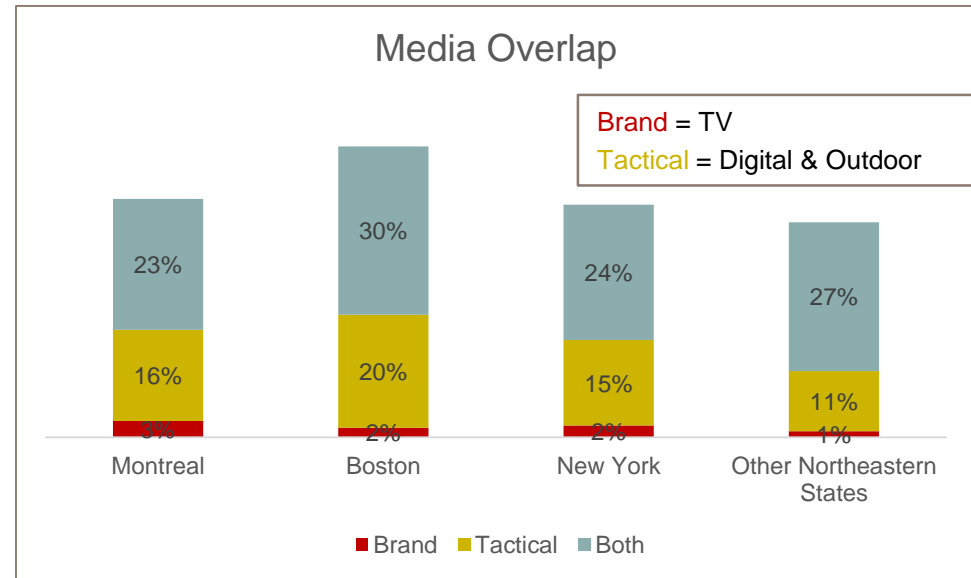


Type of Digital Recall



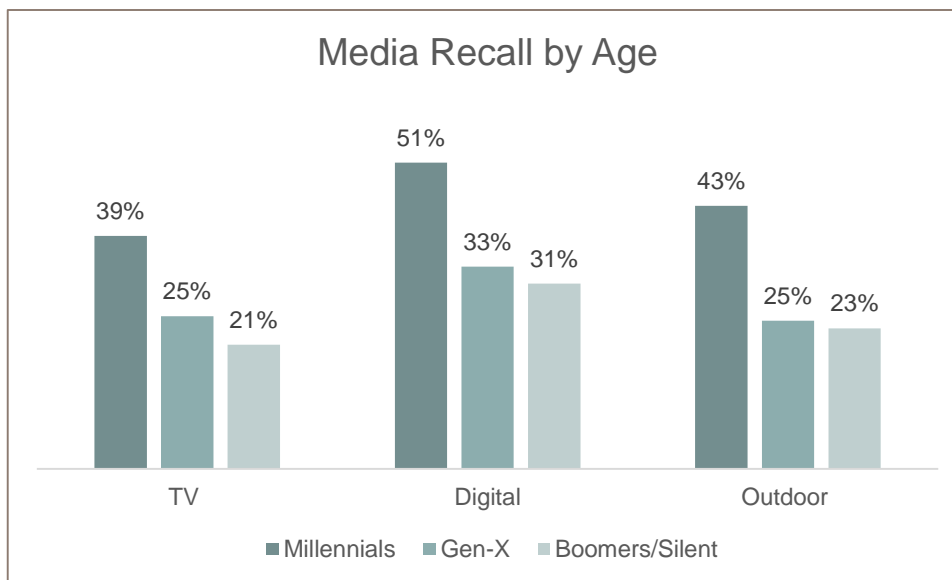
Media Overlap

- SMARInsights has found that different forms of media serve destinations in different ways. For example, TV and print tend to best build a destination's brand while tactical media like digital, outdoor and radio are better at delivering a call to action.
- The overlap between brand and tactical forms of media often lead to increased interest and visitation.
- It is encouraging that in each target market, more than half of those aware of the New Hampshire media were exposed to both brand and tactical components.



Recall by Generation

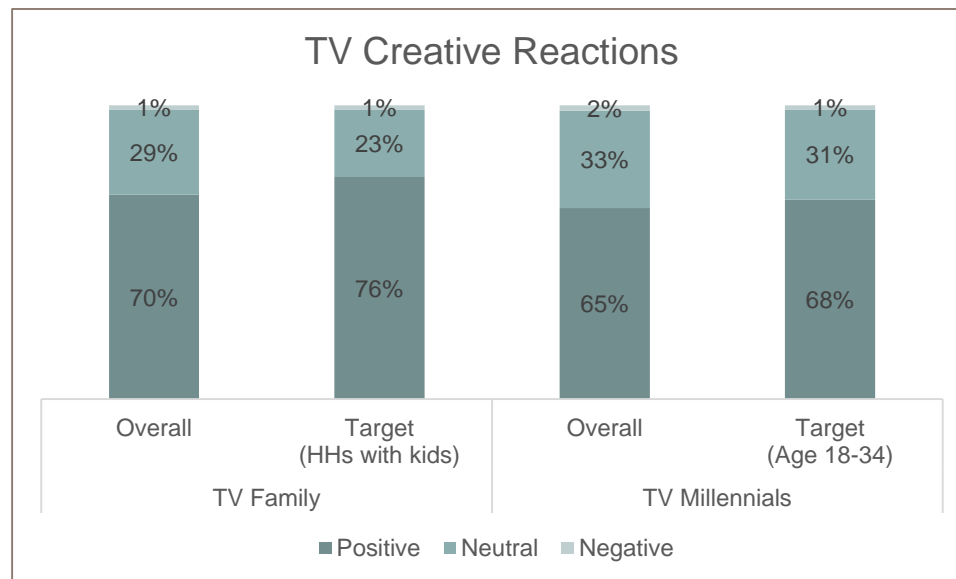
- Given younger audiences tend to have higher rates of engagement with the digital components of the campaign, including paid social, it is not surprising that younger audiences have higher rates of recall for this media.
- However, recall is considerably higher by this audience for TV and outdoor as well. TV can be targeted to age demographics via both programming and delivery to smart devices. Outdoor components of the campaign were more heavily in rotation in transit stations which tend to have younger riders than the overall population. These kinds of placements could be contributing to reaching younger audiences.



CREATIVE REVIEW

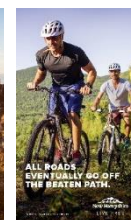
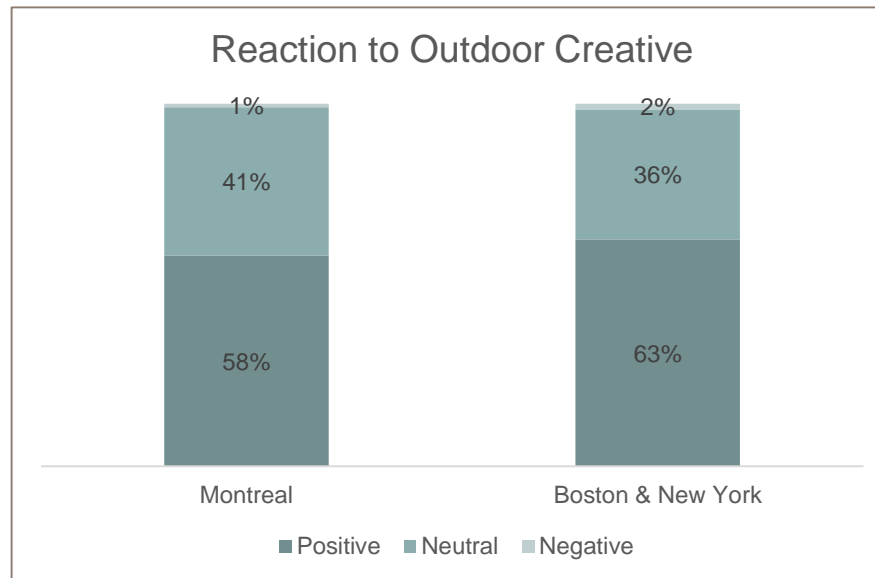
Creative Reaction

- While the goal for destination marketing creative is to communicate messages designed to impact the image of and interest in the state or city, how consumers perceive the marketing can be relevant to recall. SMARInsights often sees marketing that generates a more positive reaction from consumers often also has a higher rate of recall. Overall, consumers are positive about both brand TV spots. The family-oriented spot generates a stronger response than the Millennial-focused spot. Those with kids in the house are especially positive about the Family spot. Those in the age range to which the Millennial spot is focused are more positive than general consumers.



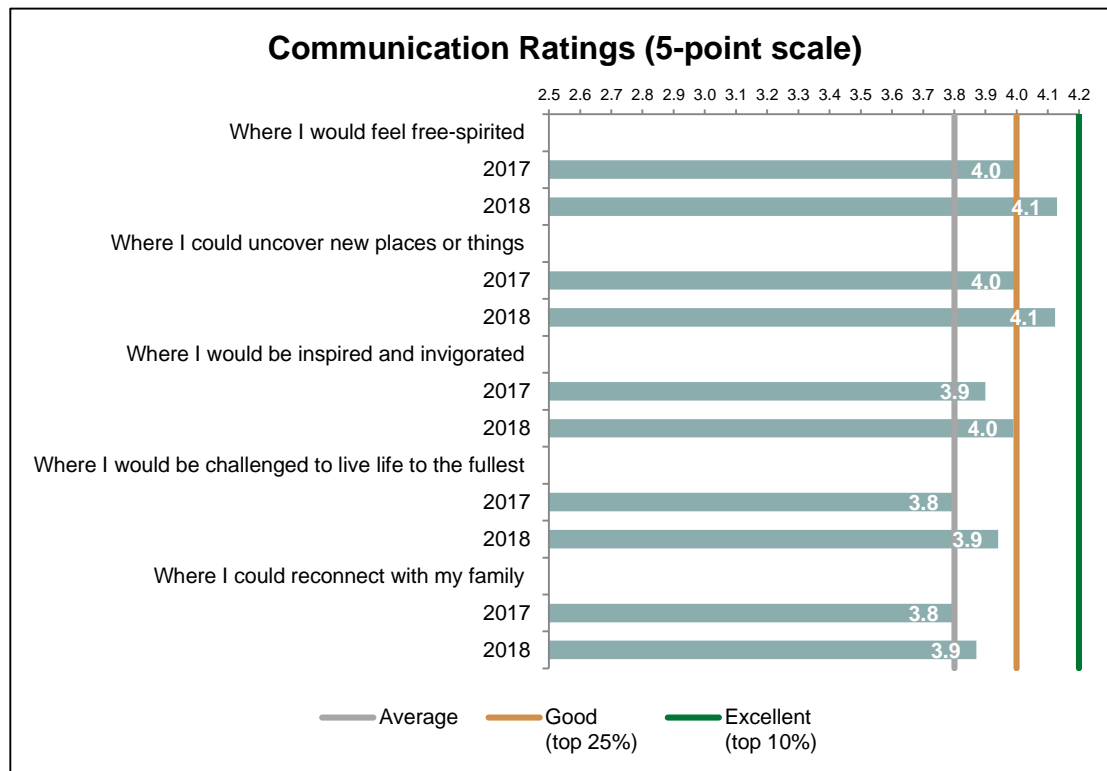
Creative Reaction

- SMARInsights often sees that when consumers are rating a campaign, TV spots often garner higher ratings than other components of the campaign. With this, the outdoor creative receives slightly lower ratings than TV. However, perceptions of the creative are tied to familiarity with New Hampshire, with Boston the most familiar and Montreal the least familiar.



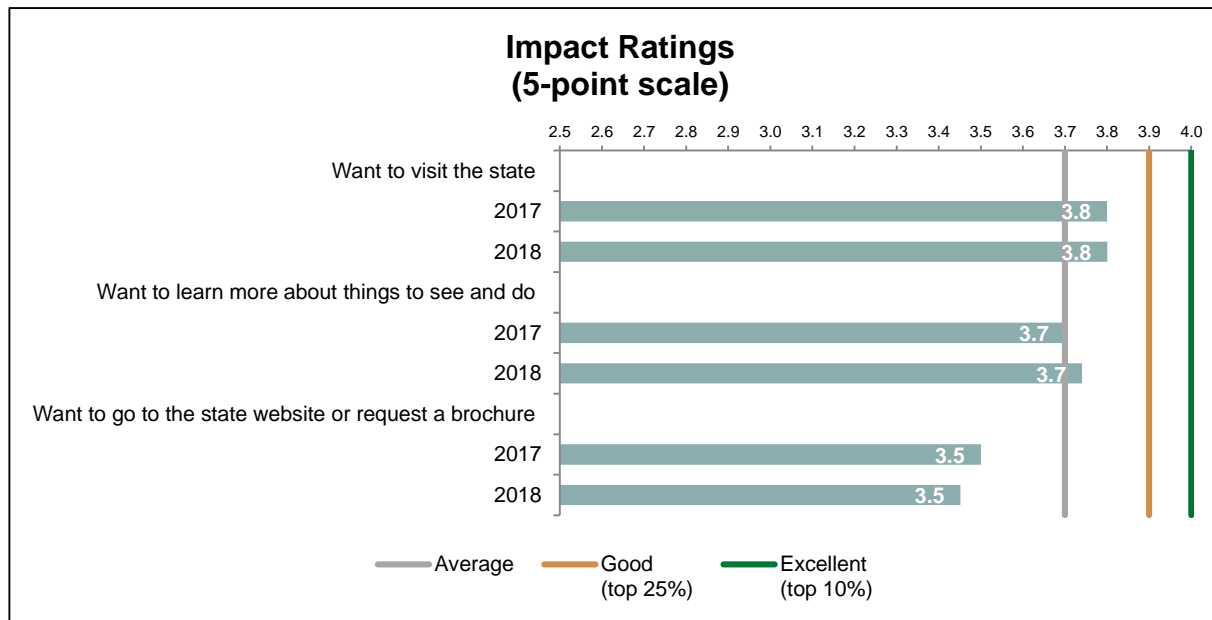
Communication Attributes

- SMARInsights has developed benchmarks for DMO creative based on the evaluation of hundreds of campaigns. Across all attributes, the 2018 executions improved over the previous year.
- The campaign in performing in the top 25% of all DMO creative measured for showing a place where consumers would feel free-spirited, experience new things and be inspired.
- While the lowest rating is for showing a place to connect with family, even this measure is performing above average.



Impact Attributes

- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult to achieve than just communicating a desired message. Even so, the campaign is performing above average for making consumers want to visit and to learn more about New Hampshire.



IMPACT OF THE ADVERTISING

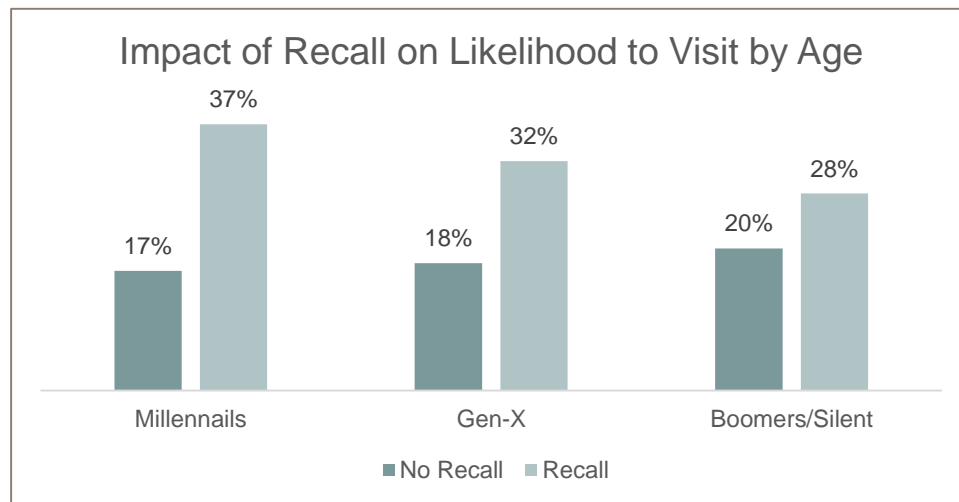
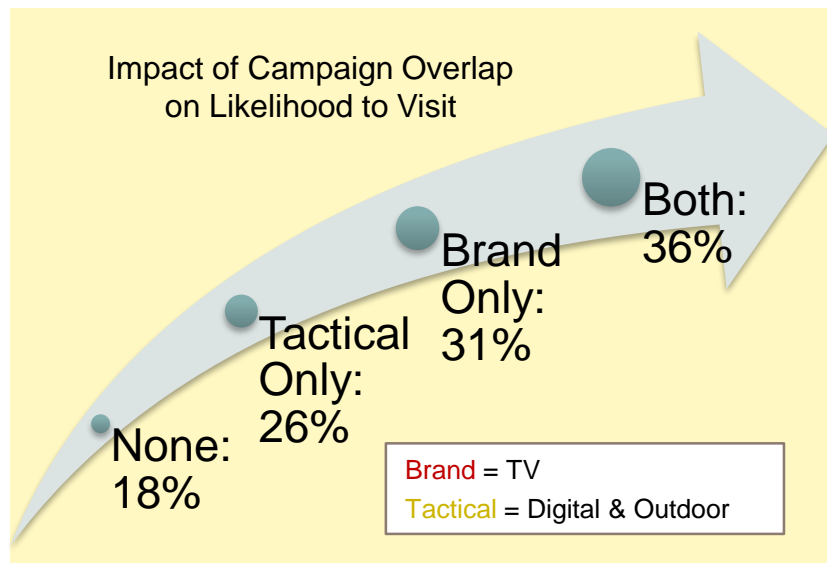
Impact on Image

- While the goal of destination marketing is to generate additional visitation, there are other ways in which the advertising can have influence. This includes improving the image of the destination.
- Across all attributes, awareness of the campaign improves the image of New Hampshire. In bold are the attributes identified in the 2016-17 Advertising Effectiveness Study as important as Opportunities to Improve.
- The advertising has a positive influence on these attributes but there a number of other attributes which the advertising is having more influence. While being a place that's good for the beach and fairs and festivals has the most lift, these were not considered drivers to interest in visitation to New Hampshire in the previous study.
- Creative that focuses on those things considered drivers could improve the image and spur additional interest in New Hampshire.

	No Recall	Recall	% Lift
Is a good place to go to the beach	3.2	3.5	9%
Is a good place for fairs and festivals	3.7	4.0	9%
Is a place I would be excited to visit for a leisure trip	3.8	4.1	9%
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.6	3.9	8%
Is a fun and exciting place	3.7	4.0	7%
Offers great vacations for people like me	3.8	4.1	7%
Offers an attractive lifestyle	3.7	4.0	7%
Is rich in culture and the arts	3.4	3.6	7%
Is a great place to vacation when traveling with children	3.8	4.0	7%
Always has something new to discover	3.7	3.9	7%
Is unique because of the variety of destinations and activities it offers vacationers	3.8	4.0	6%
Is a kid-friendly vacation destination	3.9	4.1	6%
Has great parks	3.9	4.1	6%
Is a good place for water activities	3.6	3.8	5%
Is a good place for shopping	3.7	3.9	5%
Is a good place to live and work	3.6	3.8	4%
Has interesting historical sites and museums	3.7	3.9	4%
Is easy to get to	4.1	4.2	4%
Is safe	4.2	4.3	4%
Is affordable	3.9	4.1	3%
Is beautiful	4.3	4.4	2%
Offers lots of outdoor recreation	4.3	4.4	2%
Is a great place for winter sports such as skiing and snowmobiling	4.1	4.2	1%

Impact on Likelihood to Visit

- While the goal of this research is to evaluate the impact of the campaign on short-term travel that occurred because of the advertising, the media can also have longer-term impact on future travel. Those with recall are considerably more likely to visit New Hampshire in the next 12 months, with considerably more influence with younger audiences.
- There is, however, a considerable difference in likelihood to visit depending on the type of media to which consumers are exposed. Those that only saw tactical media of digital and outdoor were slightly more likely to consider visiting the state. Very few consumers were aware of only the brand creative, but these consumers are even more interested in future visitation. But when exposed to both brand and tactical, likelihood to visit increases substantially.



*Likelihood defined as 100% of households "already planning a trip" + 80% "very likely" to visit + 20% "somewhat likely" to visit

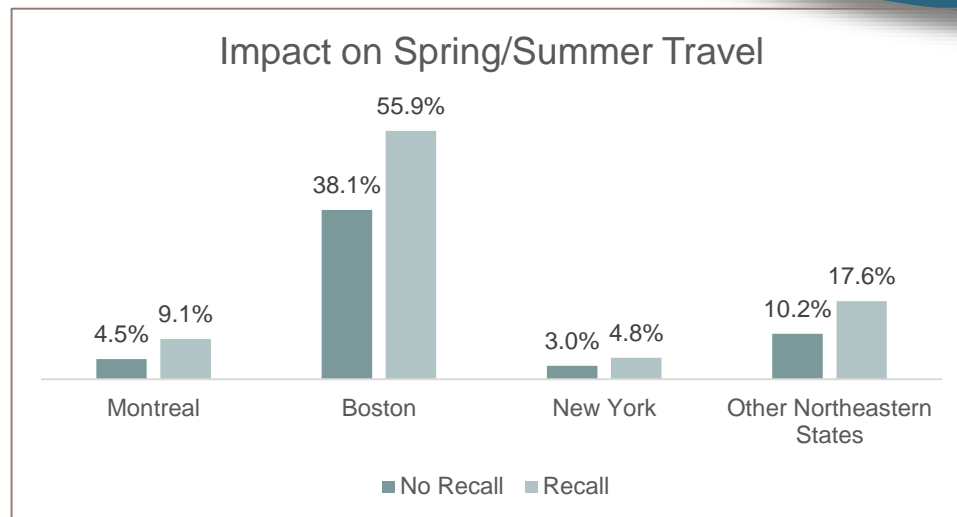
Incremental Travel

- While likelihood to visit is a good indicator for future performance of the campaign, it is the number of trips that the campaign is able to generate on which the effectiveness of the advertising is measured.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.



Impact of the Advertising on Travel

- Overall, the spring and summer media generated nearly 400,000 trips to New Hampshire after the media began airing in April.
- Nearly half of the influenced trips are from Boston. The level of incremental travel the advertising continues to generate from the market is impressive given the high rate of unaware travel from this very familiar, nearby market. SMARInsights often sees that destinations struggle to generate impact from markets with high rates of unaware travel. The message for Boston is compelling as New Hampshire continues to have strong incremental travel from the market.
- The second highest producing market was other areas of the Northeast.
- While the increment from New York City is small, it is such a large population center, even a small increment results in a significant number of influenced trips.
- While Boston and New York City have very high and very low incremental travel rates respectively, the rate generated from Montreal is in keeping with the average SMARInsights sees of around 5%.



	Montreal	Boston	New York	Other NE States	Total
Aware HH	708,856	1,116,113	2,741,671	1,622,459	6,189,099
Incremental Travel	4.6%	17.8%	1.8%	7.4%	6.5%
Incremental Trips	32,403	198,443	49,364	119,277	399,487

Ad Impact Trip Details

- In addition to influencing the image of the state, interest in future travel and impacted travel to New Hampshire, the advertising can also impact trips in terms of the kinds of trips visitors take, how long they stay, what they do and how much they spend.
- Aware visitors participate in more trip activities and stay longer, resulting in higher trip spending. Trips by aware consumers are also more likely to include children under 18.

Trip Specifics	No Recall	Recall
Nights in New Hampshire	2.5	3.6
Day Trips	11%	10%
People in your travel party	3.1	3.3
Kids on trip	22%	37%
Staying with friends and family	23%	21%
Average spending	\$623	\$829
Per person/per day spending	\$80	\$71

	No Recall	Recall	Difference
Hiking or backpacking	17%	31%	14%
Camping	8%	20%	12%
Canoeing or kayaking	7%	18%	11%
Visiting a state or national park	24%	34%	10%
Fishing	4%	13%	9%
Visiting historical sites	14%	23%	9%
Winery tours	2%	10%	8%
Bird watching	5%	13%	8%
Wildlife watching	13%	21%	8%
Bicycling or mountain biking	3%	10%	8%
Boating	9%	16%	7%
Rock climbing	0%	6%	6%
Beer trail	3%	7%	4%
Visiting museums	9%	13%	4%
Golfing	4%	8%	4%
Attending a festival or fair	14%	18%	4%
River rafting	2%	5%	4%
Farmer's markets/U-picks/roadside stand	17%	20%	4%
Shopping	51%	54%	4%
Attending performing arts (music/theater)	4%	8%	3%
Hunting	1%	4%	3%
Sightseeing tour	15%	18%	3%
Horseback riding	1%	3%	1%
Farm to table dinner	4%	5%	1%
ATVing	2%	3%	1%
Visiting a noteworthy bar or nightclub	10%	11%	1%
Dining at locally owned restaurants	53%	53%	0%
Attending a play or concert	5%	5%	0%
Scenic drive	53%	52%	-1%

Return on Investment by Market

- Given different markets take different trips to New Hampshire, spending varies by how long visitors stay, what kind of lodging they use and what they do on their trips. With this, visitors from Boston spend the least and visitors from New York spend the most.
- But with the most influenced trips, Boston has the highest return on investment, followed by Montreal and other states in the Northeast. The average return on investment for state destination marketing organizations is \$179. Overall the campaign is meeting this benchmark, but Boston is the only market besting the average.
- In focus groups in New York City in August 2018 evaluating New Hampshire creative, it was evident the market is decidedly different than other markets from which New Hampshire visitors originate. With low rates of incremental travel overall from New York, it is likely worthwhile exploring targeting a higher income audience in this market. In-person focus groups conducted earlier in 2018 for the Division highlighted income differences for consumers here. Past research has shown that 64% of New Hampshire visitors have incomes under \$100,000. However, cost of living in New York is such that it likely makes the income of a target audience willing to consider a New Hampshire trip higher than this.

	Montreal	Boston	New York	Other NE States	Total
Influenced Trips	32,403	198,443	49,364	119,277	399,487
Visitor Spending	\$898	\$757	\$977	\$785	\$804
Influenced Spending	\$29,082,784	\$150,171,784	\$48,213,961	\$93,632,590	\$321,101,120
Media Spending	\$166,242	\$422,368	\$665,463	\$540,024	\$1,794,097
ROI	\$175	\$356	\$72	\$173	\$179

Return on Investment

- The fall and winter 2017-18 campaigns were evaluated separately. When combined with the impact of the spring and summer media buy, the overall influence in more than 600,000 trips and \$500 million. This pushed the return on investment for the fiscal year to \$204 -- higher than the average state DMO of \$179.

	2017-18 Fall & Winter Influence	2018 Spring & Summer Influence	Total 2017-18 Fiscal Year
Influenced Fall & Winter Trips	204,568	399,487	604,055
Aware Trip Spending	\$907	\$804	\$839
Influenced Trip Spending	\$185,578,461	\$321,101,120	\$506,679,581
Media Spending	\$687,891	\$1,794,097	\$2,481,988
ROI	\$270	\$179	\$204

Tax Return on Investment

- Of the influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so not all visitor expenditures are subject to tax. Only those related to lodging, meals, and transportation are taxed.
- Again combining the influence of the fall and winter media campaigns with this evaluation of spring and summer, the 2017-18 fiscal year generated nearly \$32 million in taxes to the state.
- This returns nearly \$13 in taxes for every \$1 invested in paid media over the course of the fiscal year, higher than the average for state DMOs of \$11.

	2017-18 Fall & Winter Influence	2018 Spring & Summer Influence	Total 2017-18 Fiscal Year
Influenced Trips	204,568	399,487	604,055
Taxable Spending	\$562	\$598	\$586
Total Influenced Taxable Spending	\$114,980,198	\$238,957,240	\$353,937,438
Taxes Generated	\$10,348,218	\$21,506,152	\$31,854,370
Tax ROI	\$15.04	\$11.99	\$12.83

Fiscal Year Return on Investment

- There was a significant increase in the number of influenced trips from the previous year, rebounding the return on investment to higher than industry averages.
- There was significantly less spending on paid media in the 2017-18 fiscal year as compared to two years ago. And while there are fewer influenced trips and overall taxes returned to the state, the tax return on the investment is higher.

Visitor Spending Return on Investment	2015-16	2016-17	2017-18
Incremental Trips	750,817	393,248	604,055
Total Trip Spending	\$1,107	\$850	\$839
Influenced Visitor Spending	\$831,359,416	\$334,089,342	\$506,679,581
Media Expenditures	\$3,742,250	\$2,282,335	\$2,481,988
Return on Investment	\$222	\$146	\$204

Tax Return on Investment	2015-16	2016-17	2017-18
Influenced Trips	750,817	393,248	604,055
Taxable Spending	\$562	\$545	\$586
Total Influenced Taxable Spending	\$422,067,002	\$214,914,565	\$353,937,438
Taxes Generated	\$37,986,030	\$19,342,311	\$31,854,370
Tax ROI	\$10.00	\$8.47	\$12.83

Questionnaire

APPENDIX

**New Hampshire Tourism
Ad Awareness and ROI
October 2018**

Quotas	
600	Montreal
400	Boston
800	New York City
500	Other NE States
2,300	TOTAL

ZIP. What is your postal/ZIP code? _____

These are the screeners to identify leisure travel decision makers.

S1. Please indicate if each of the following apply to you. Select all that apply.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	<input type="checkbox"/>	<input type="checkbox"/>
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0, TERMINATE AFTER SCREENING QUESTIONS)	<input type="checkbox"/>	<input type="checkbox"/>
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	<input type="checkbox"/>	<input type="checkbox"/>
I use video streaming services like Hulu or Netflix	<input type="checkbox"/>	<input type="checkbox"/>

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age? _____ [TERMINATE under 18 - over 65]

Questions 1-5 will be used to evaluate the impact of the advertising on top-of-mind recall, familiarity and travel.

1. Thinking about places to go for domestic leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

STATE #1 _____
STATE #2 _____
STATE #3 _____
STATE #4 _____
STATE #5 _____

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you prefer to visit for a leisure trip within the next year? Please select only one. [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

5. Have you visited any of the following states since March 2018 for a leisure trip? How many trips did you take in each state since March 2018?

[ROTATE]	States visited since March 2018 (Select all that apply)	Number of visits since March 2018
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

Questions 6-8 will be used to evaluate the impact of the advertising on information gathering and image of New Hampshire.

6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?

1. Requested a New Hampshire Visitor's Guide
2. Visited the New Hampshire Tourism site, www.visitnh.gov
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on Twitter
5. Followed Visit New Hampshire on Instagram
6. Requested information about a New Hampshire trip in another way
7. Received e-newsletter
8. None of these

IF Q6_2=1, ASK Q7



Q7. Is this the New Hampshire website you visited?

1. Yes
0. No

IF 6_3=1, ASK Q7A



New Hampshire\2018\Spring-Summer 2018\facebook 6-29-18.JPG

Q7a. Is this the New Hampshire Facebook page you accessed?

1. Yes
0. No

[MASSACHUSETTS AND BOSTON DMA ONLY]

IF 6_3=7, ASK Q7B



eNewsletter_Boston.com_580x600.jpg

Q7b. Is this similar to the New Hampshire e-newsletter you received?

1. Yes
0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					

Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)

Now, please give us some information about the trip(s) you took to New Hampshire since March 2018.

Questions 9-23 will be used to understand New Hampshire trips, including party composition, trip activities and spending.

9. When since March 2018 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- 3..... March 2018
- 4..... April 2018
- 5..... May 2018
- 6..... June 2018
- 7..... July 2018
- 8..... August 2018
- 9..... September 2018
- 10..... October 2018

Now we'd like to ask you some questions about your most recent trip to New Hampshire.

10_1. How many nights did you spend in New Hampshire during this trip? _____

10_2. Including you, how many people were in your travel party? _____

ASK Q10b if Q10_2 >1

10b. Of those, how many were children under age 18? _____

10c. What forms of lodging did you use during your trip? Select all that apply.

Luxury resort hotel	
High-end full-service hotel	
Mid-level hotel	
Budget hotel or motel	
Bed and breakfast/Inn	
Airbnb	
Camping/RVing	
Home of family or friends	
Vacation home	
Other	

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply.

[ROTATE]

Hiking or backpacking	Wildlife watching	
Visiting a state or national park	Bird watching	
Bicycling or mountain biking	Scenic drive	
ATVing	Sightseeing tour	
Rock climbing	Golfing	
Horseback riding	Shopping	
Hunting	Dining at locally owned restaurants	
Camping	Visiting a noteworthy bar or nightclub	
River rafting	Farm to table dinner	
Fishing	Winery tours	
Visiting museums	Beer trail	
Attending a play or concert	Farmer's markets/U-picks/roadside stand	
Attending a festival or fair	Canoeing or kayaking	
Attending performing arts (music/theater)	Boating	
Visiting historical sites	Other, please specify	
	None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to New Hampshire. You may choose up to 3.

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was...?

5. Excellent
4. Very good
3. Good
2. Fair
1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind?

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

Lodging/Accommodations	
Meals/Food/Groceries	
Entertainment/Attractions	
Shopping	
Entertainment such as shows, theater or concerts	
Transportation to New Hampshire	
Transportation within New Hampshire	
Other	

17. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

18. Did you post any information about this trip on the following outlets? Select all that apply.

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. None of these

23. How likely are you to recommend a trip to New Hampshire?

1. Very likely
2. Somewhat likely
3. Not likely

Questions 24-27 will be used to measure recall of New Hampshire advertising.

24. Have you seen any advertising for New Hampshire as a travel destination?

1. Yes → ASK 24A
0. No

24a. What do you recall about the ads? _____

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

ROTATE SEASONS

Summer Digital Ads DIGITAL



biking_300x600.jpg



hiking_300x600.jpg



mobile_320x50.jpg



retargeting_300x600.jpg



CANADA ONLY
canadian targeted banner_300x600.jpg

Summer Digital. Please indicate if you have seen each of these online ads before.

- Yes, I have seen this ad before
No, I have not seen this ad before

SummerDigitalB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SummerDigitalC

SummerDigitalC. Why do you feel that way? _____

Spring Social Ads Facebook



Facebook hiking.png



Facebook waterfall.png



Facebook lake.png



Facebook trail ride.png

Instagram



Instagram atv.png



Instagram kayak.png



Instagram trail ride.png

SpringSocial. Please indicate if you have seen each of these social media ads before.

- Yes, I have seen this ad before
No, I have not seen this ad before

SpringSocialB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SpringSocialC

SpringSocialC. Why do you feel that way? _____

Summer Social Ads Social



Facebook Rev up your summer.png



Facebook 6 NH Summer Spots Kids.png

Instagram



Instagram 1.png



Instagram 2.png

SummerSocial. Please indicate if you have seen each of these social media ads before.

- Yes, I have seen this ad before
No, I have not seen this ad before

SummerSocialB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SummerSocialC

SummerSocialC. Why do you feel that way? _____

Summer 2018 Ads

TV



Family TV Spot.mp4
<https://youtu.be/5g11eNiaruo>



Millennial TV Spot.mp4
<https://www.youtube.com/watch?v=coPMgYHVRc>

ASK TV SERIES FOR EACH SPOT

SummerTV. How many times have you seen this or a similar ad for New Hampshire?

- 3 More than three times
- 2 Two or three times
- 1 Once
- 0 Never

ASK FOR EACH AWARE

SummerTVA. Where do you recall seeing the ad? Select all that apply.

1. On TV
2. Online
3. Don't recall

ASK FOR EACH VIDEO

SummerTVB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK SummerTVC

SummerTVC. Why do you feel that way? _____

Digital Activity Videos

Summer 2018



BIKING 15-HD.mp4

<https://youtu.be/gUNIKu1-Je8>



HIKING 15 - TAPAD.mp4

https://youtu.be/hSzIwBN_i-A



KAYAK 15-HD.mp4

<https://youtu.be/iI-0hgXzIDE>

ASK FOR EACH VIDEO

SummerActivity. How many times have you seen this or a similar ad for New Hampshire?

- 3 More than three times
- 2 Two or three times
- 1 Once
- 0 Never

ASK FOR EACH AWARE

SummerActivityA. Where do you recall seeing the ad? Select all that apply.

1. On TV
2. Online
3. Don't recall

ASK AFTER ALL VIDEOS SHOWN

SummerActivityB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK WinterActivityC

SummerActivityC. Why do you feel that way? _____

OOH

Billboard
HARTFORD

ADVENTURES
ARE FOR
SHARING.

@visitnh



BOSTON



I-93 Boston Billboard Build-out.jpg

NYC



NYC Wallscape_Soho.jpg

MONTREAL



montreal_biking_576x2882.jpg



montreal_hiking_576x2883.jpg



montreal_kayak_576x288.jpg

Station Takeover
BOSTON & NYC



digital
liveboard_1080x1920_hiking.jpg



digital
liveboard_1080x19202_kayaking.jpg



digital
liveboard_1080x19203_biking.jpg



digital
liveboard_1080x19204_surfing.jpg



digital
liveboard_1080x19205_atv.jpg



two sheet rail
poster_60x46_Page_1.jpg



two sheet rail
poster_60x46_Page_2.jpg



two sheet rail
poster_60x46_Page_3.jpg

Train Stations - 3 PANEL WALL BOSTON & NYC



biking total.jpg



hiking total.jpg



kayak total.jpg

Bus Shelter Posters BOSTON & NYC



NYC bus
shelter_biking.jpg



NYC bus
shelter_canoe.jpg



NYC bus
shelter_hiking.jpg



NYC bus
shelter_kayak.jpg

SHOW ALL ON ONE PAGE

SummerOutdoor. Have you seen these or similar ads before now?

- ☐ I have seen ads like these before now
☐ I have never seen ads like these

SummerOutdoorB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK 27c

SummerOutdoorC. Why do you feel that way? _____

Questions 28-29 will be used to evaluate the messaging of the advertising.

28. Given all of these ads together, how much do you think this campaign shows a place...? ROTATE

	Strongly disagree				Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

29. How much does this campaign make you...? ROTATE

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

Questions D1-7 detail demographics.

The following questions are for classification purposes only so that your responses may be grouped with those of others.

DEMOS [DO NOT FORCE]

The following questions are for classification purposes only so that your responses may be grouped with those of others.

- D3. Are you currently ...?
Married
Divorced/Separated
Widowed
Single/Never married
- D4. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]
- D5. How many children under the age of 18 live in your household? _____
- D6. Which of the following categories represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate degree
- D7. Which of the following categories best represents your total annual household income before taxes?
Less than \$35,000
\$35,000 but less than \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$150,000
\$150,000 but less than \$200,000
\$200,000 or more
- D2. Which of the following best describes your racial and ethnic heritage? Are you...? *Select all that apply.*
African-American/black
Asian/Pacific Islander
Caucasian/white
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify _____
- D1. Are you ...?
Male Female